Kansas Area United Methodist FOUNDATION

ESTATE PLANNING SEMINARS

Basic Estate Planning
This seminar covers why you need a will or a trust, review of wills and probate process, review of trusts, how you hold title to your assets, discussion of durable power of attorney, durable power of attorney for health care, Advance Care Directives, Declaration (Living Will), review of federal and Kansas estate taxes.

Charitable Planning Techniques
It is assumed that participants for this seminar have a will or trust. The seminar reviews federal and Kansas estate taxes, discussion about amending a will or * trust to include a charitable gift, review of bequests and the wording for different types of bequests, review of planned gifts, including charitable gift annuities, life income trusts, life insurance, retirement plans, life estates, donor advised funds, and field of interest funds.

Estate Planning for Women
This seminar focus on the needs of women to take active roles in planning their estates and to help educate women on their options, whether they are married, single, or previously married. Women's unique situations require thoughtful estate planning for children's care and dependence, retirement; long-term healthcare, parental dependence, asset protection, philanthropy and other issues.

Estate Planning for Young Families
This seminar focuses on why parents need a will or trust with minor children, what a will or trust will accomplish for their family, discussion of naming guardians/conservators/trustees for minors or special needs children, discussion of durable power of attorney, durable power of attorney for health care, Advance Care Directives, Declaration (Living Will), and asset protection.

Estate Planning for Taxable Estates
This seminar is for people who have or anticipate having assets of $1 million or more. The course reviews federal and Kansas estate taxes, planning techniques to reduce or eliminate estate taxes, including life income trusts, bequests, charitable gift-annuities, life insurance, charitable lead trusts, retirement plans, life estates, donor advised funds, and field of interest funds.

Retirement Planning
This seminar focuses on people who are retired or are getting prepared for retirement. The seminar reviews federal and Kansas estate taxes, having up to date wills and trusts, income needs, how to use a planned gift to increase their income in retirement, durable powers of attorney, durable powers of attorney for health care decisions, Advance Care Directives, Declaration (Living Will).

These estate planning seminars are presented by Alan D. Herndon, President and CEO and/or Lee Sankey, Director of Stewardship Services of the Kansas Area United Methodist Foundation. Please contact Alan or Lee to schedule a seminar.

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